

# Summarise Information

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Some sample use cases for summarising information include:

- Summarising Meeting Minutes
- Summarising Meeting Agendas
- Summarising Financial Statements
- Summarising Information in a File

**Duration: 10 to 15 minutes**

## Introduction

As part of this exercise we are going to summarise a financial statement documents to validate some of the capabilities of the models.

## Summarise Financial Statement




In this exercise, we will summarise the financial statement of a publicly listed company.

### 1. Download the following documents:

- [Summary](#)
- [Financial Statement](#)

### 2. Add Your Data:

# Playground

 Manual evaluation    Deploy to a web app    Import   


System message

**Add your data**

Examples



Ask questions about your own data. Your data is stored securely in your Azure subscription. [Learn more about how your data is protected.](#)

Select project index \* 

Select project index



+ Add your data

+ Add your data

 Connect external index

### 3. Select the Financial Document:

## Add your data

- 1 Source data
- 2 Index storage
- 3 Search settings
- 4 Index settings
- 5 Review and finish

## Select your data

Select the data you want the generative AI to reference so it can ground its responses on your specific







Your data will be ingested into an Index, which allows the Generative AI model to quickly and accurately find information for your specific use case.

Data source \*  storagetravel  

Selected path: Half-Yearly-Report-and-Accounts.PDF



 Filter...

		Name	Cre
<input type="radio"/>		Dubai Brochure.pdf	Ma
<input checked="" type="radio"/>		Half-Yearly-Report-and-Accounts.PDF	Ma
<input type="radio"/>		Las Vegas Brochure.pdf	Ma
<input type="radio"/>		London Brochure.pdf	Ma
<input type="radio"/>		Margies Travel Company Info.pdf	Ma
<input type="radio"/>		New York Brochure.pdf	Ma

Next

Cre

#### 4. Configure the Index Storage:

## Add your data

- ✓ Source data
- 2 Index storage
- 3 Search settings
- 4 Index settings
- 5 Review and finish

### Index storage

Select where to store your new index

#### Index storage \*

Azure AI Search

#### Select Azure AI Search service \* ⓘ

srch-davida-dev-aue-001-AzureAISearch-wqhcfhz79v-shared

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## 5. Search Settings:

## Add your data

- ✓ Source data
- ✓ Index storage
- 3 Search settings
- 4 Index settings
- 5 Review and finish

## Configure search settings

Adding vector search supports: Hybrid (vector + keyword search), Hybrid + Semantic (most accurate for generative AI applications), Vector, Semantic and Keyword retrieval. Hybrid will be set as default and inference time in the playground. Not adding vector search supports: Keyword and Semantic retrieval set as default and can be changed at inference time in the playground. Adding vector search requires an embedding model. [Learn more](#)

## Vector settings

☒ Add vector search to this search resource

## Azure OpenAI resource \* ⓘ

Default\_AzureOpenAI

☒ I acknowledge that Azure OpenAI embedding model, **text-embedding-ada-002 (Version 2)**, is not already.

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Create

## 6. Index Settings:

## Add your data

- ✓ Source data
- ✓ Index storage
- ✓ Search settings
- 4** Index settings
- 5 Review and finish

### Index settings

Configure your index

Index name \* ⓘ

ixfinancial

Schedule updates \* ⓘ

One time indexing (no scheduled updates) ▾

Virtual machine \* ⓘ

☒ Auto select ☐ Select from recommended options ☐ Select from all options

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## 7. Review and Finish:

## Add your data

- ✓ Source data
- ✓ Index storage
- ✓ Search settings
- ✓ Index settings
- 5 Review and finish

## Review and finish

Review the configurations you set for your index

## Index name

ixfinancial

## Index storage

Azure AI Search

## Azure AI Search connection

srch-davida-dev-aue-001-AzureAISearch-wqhcfhz79v-shared

## Include vector settings

Yes

## Schedule

OneTime

## Compute

Serverless compute (Auto select)

[Back](#)[Create](#)[Cancel](#)

**Note:** When you reach this stage, please inform the instructor.

This step will take a few minutes (10 to 30 minutes); feel free to take a short break.

Summarise the financial statement, and highlight the following key points:  
Revenue  
Gross Profit  
EBITDA  
Net Cash Flow  
For the 1H FY 24.

**Playground**

Manual evaluation Deploy to a web app Import Export View Code Prompt samples Customize in prompt flow

System message **Add your data** Examples

Gain insights into your own data source. Your data is stored securely in your Azure subscription. [Learn more about how your data is protected.](#)

Index:  
[ixfinancial](#)

Search type:  
Hybrid (vector + keyword) [Learn more about different search types](#)

Advanced settings >

Remove data source

Replay chat Clear chat | Playground Settings Show JSON

Summarise the financial statement, and highlight the following key points:  
Revenue  
Gross Profit  
EBITDA  
Net Cash Flow  
  For the 1H FY 24.

The financial statement for the 1H FY 24 of Megaport Limited includes the following key points:

- Revenue: The Group's revenue for the period was \$95.1 million, representing an increase of \$24.4 million or 35% compared to the same period in the previous year <sup>1</sup>.
- Gross Profit: The gross profit for the 1H FY 24 was \$66.6 million, indicating an increase of 43% compared to the previous year <sup>1</sup>.
- EBITDA: The EBITDA for the period was \$30.1 million, a significant increase from \$3.4 million in the previous year <sup>1</sup>.
- Net Cash Flow: The net cash balance as of December 31, 2023, was \$45.8 million, reflecting an increase from \$33.3 million as of June 30, 2023 <sup>1</sup>.

These key points demonstrate the positive financial performance and growth of Megaport Limited during the 1H FY 24 <sup>1</sup>.

Type user query here. (Shift + Enter for new line)

Open the "1H-FY24-Investor-Presentation.PDF" documented downloaded before and navigate to page #3, is the information correct?

Trying with a more complex prompt.

Provide the revenue performance for the following regions: North America, Asia Pacific, EMEA, and a total as Global (composed of the previously mentioned regions). Show the total revenue and the percentage increase compared to the previous year.

Open the "1H-FY24-Investor-Presentation.PDF" documented downloaded before and navigate to page #4, is the information correct?

The model might not be accurate for multiple reasons, including:

- **Context Understanding:** ChatGPT may struggle to grasp full document context, leading to incomplete or inaccurate summaries.
- **Complex Information:** Summarising technical content accurately requires deep subject matter understanding, posing challenges for the model.
- **Dealing with Ambiguity:** Documents often contain ambiguous information, challenging for ChatGPT to summarise effectively.
- **Coherence Maintenance:** Ensuring summary coherence and logical flow while condensing information is a model challenge.
- **Identifying Key Points:** ChatGPT may have difficulty distinguishing essential information, leading to critical point omission.



- **Variability Handling:** Document variability in structure, style, and content makes one-size-fits-all summarisation challenging.
- **Length Constraint Addressing:** Summaries often have length limits, requiring effective information prioritisation and condensation.
- **Unstructured Data Handling:** Documents may contain unstructured data, such as tables or images, challenging for accurate summarisation.
- **Subjectivity Accounting:** Summarising subjective content accurately requires nuanced understanding, posing difficulties for the model.
- **Multimodal Content:** Documents may include text and multimedia elements, adding complexity to summarisation.

Remove the data source and clear chat.

The screenshot shows the 'Playground' interface of Actionable Data Analytics. On the left sidebar, under 'Add your data', there is a 'Remove data source' button highlighted with a red box. The main chat area shows a system message: 'Gain insights into your own data source. Your data is stored securely in your Azure subscription. [Learn more about how your data is protected.](#)'. Below this is a search type dropdown set to 'Hybrid (vector + keyword)'. The chat history shows a user query: 'Provide the revenue performance for the following regions: North America, Asia Pacific, EME, and a total as Global (made up of the previously mentioned regions). Show the total revenue, and the % increase in comparison from the previous year.' The response from the model is: 'The revenue performance for Megaport Limited in the 1H FY 24 across different regions is as follows: ...'. The 'Clear chat' button is also highlighted with a red box.

## Sumarising Meeting Minutes

Summarising meeting minutes offers an efficient means to reduce administrative burden. By hosting structured discussions and highlighting key action items, we facilitate easier retrieval of specific information.

Use the following prompt:

Summarise the following meeting minutes, I want a table with the following columns as a result: Action, Description, Responsible.

2024-03-26 10:00 Alice Johnson: Good morning, everyone. Let's start with a review of our project milestones. Bob, could you provide an update on the development progress?

2024-03-26 10:01 Bob Smith: Sure, Alice. We've completed the frontend development

and are now focusing on backend integration. We're slightly behind schedule due to unexpected issues with third-party APIs.

2024-03-26 10:03 Alice Johnson: Thanks, Bob. Claire, how's the backend integration going from your perspective?

2024-03-26 10:05 Claire Davis: We've managed to resolve most of the issues, but there are still a few bugs to iron out. I estimate we'll need another two days to finalise the integration.

2024-03-26 10:07 Alice Johnson: Okay, let's make sure to allocate resources accordingly to meet the deadline. David, how's the design aspect coming along?

2024-03-26 10:09 David Rodrigues: The design is on track. We've incorporated the feedback from the stakeholders and are finalising the UI elements. I anticipate completing the design by the end of the week.

2024-03-26 10:11 Alice Johnson: Great to hear. Emily, any updates from the marketing side?

2024-03-26 10:13 Emily Wilson: We've started drafting the marketing strategy and have scheduled a meeting with the PR team next week to discuss the launch plan.

2024-03-26 10:15 Alice Johnson: Perfect. Now, let's define the action items. Bob, can you follow up with the third-party API provider to address the integration issues?

2024-03-26 10:17 Bob Smith: Sure thing, Alice. I'll reach out to them today and provide an update by tomorrow.

2024-03-26 10:19 Alice Johnson: Claire, please continue troubleshooting the remaining bugs in the backend and keep me updated on the progress.

2024-03-26 10:21 Claire Davis: Will do, Alice. I'll prioritise resolving the bugs and will keep you informed.

2024-03-26 10:23 Alice Johnson: David, finalise the design by Friday and share it with the team for feedback.

2024-03-26 10:25 David Rodrigues: Understood, Alice. I'll ensure the design is ready for review by the end of the week.

2024-03-26 10:27 Alice Johnson: Emily, coordinate with the PR team and finalise the launch plan by next Wednesday.

2024-03-26 10:29 Emily Wilson: Absolutely, Alice. I'll work closely with the PR team and ensure we have a solid plan in place.

2024-03-26 10:31 Alice Johnson: Excellent. If there's no other business, let's adjourn the meeting. Thank you, everyone.

2024-03-26 10:32 David Rodrigues: Before we adjourn, Alice, I'd like to suggest exploring alternative design options for the user interface. It might enhance user experience.

2024-03-26 10:34 Alice Johnson: That's a good point, David. Let's schedule a brainstorming session for tomorrow to discuss the design alternatives.

2024-03-26 10:36 David Rodrigues: Sounds good, Alice. I'll prepare some mockups for the session.

2024-03-26 10:38 Alice Johnson: Perfect. Let's make sure to involve the entire team in the brainstorming session to gather diverse perspectives.

2024-03-26 10:40 Bob Smith: Also, Alice, I've found a workaround for one of the API issues. I'll share the details with Claire so she can incorporate it into the backend integration.

2024-03-26 10:42 Alice Johnson: That's great news, Bob. Claire, please collaborate with Bob on implementing the workaround into the backend.

2024-03-26 10:44 Claire Davis: Will do, Alice. I'll coordinate with Bob to integrate the workaround effectively.

2024-03-26 10:46 Alice Johnson: Fantastic teamwork, everyone. Let's continue this momentum and keep pushing forward. Any other points before we conclude?

2024-03-26 10:48 Emily Wilson: Just a quick reminder, Alice. We need to confirm

the venue for the launch event. I'll take care of that today.

2024-03-26 10:50 Alice Johnson: Thank you, Emily. Please keep us updated on the venue confirmation.

2024-03-26 10:52 Alice Johnson: If there are no further points, let's officially adjourn the meeting. Thank you all for your contributions and dedication. Have a productive day ahead, everyone.

2024-03-26 10:53 Bob Smith: Thank you, Alice. Have a great day, everyone.

2024-03-26 10:54 Claire Davis: Thanks, Alice. Looking forward to the brainstorming session tomorrow.

2024-03-26 10:55 David Rodrigues: Likewise, Alice. Have a good one, everyone.

2024-03-26 10:56 Emily Wilson: Thank you, Alice. Have a productive day, all.

2024-03-26 10:57 Alice Johnson: Take care, everyone. Talk to you soon.

Review the output.

Manual evaluationDeploy to a web appImportExportView CodePrompt samplesCustomize in prompt flow

System messageAdd your dataExamples

Ask questions about your own data. Your data is stored securely in your Azure subscription. [Learn more about how your data is protected.](#)

Select project index \* ⓘ  
Select project index  
+ Add your data

Replay chatClear chatPlayground SettingsShow JSON

2024-03-26 10:52 Alice Johnson: If there are no further points, let's officially adjourn the meeting. Thank you all for your contributions and dedication. Have a productive day ahead, everyone.

2024-03-26 10:53 Bob Smith: Thank you, Alice. Have a great day, everyone.

2024-03-26 10:54 Claire Davis: Thanks, Alice. Looking forward to the brainstorming session tomorrow.

2024-03-26 10:55 David Rodrigues: Likewise, Alice. Have a good one, everyone.

2024-03-26 10:56 Emily Wilson: Thank you, Alice. Have a productive day, all.

2024-03-26 10:57 Alice Johnson: Take care, everyone. Talk to you soon.

Action Description	Responsible
Update Bob to follow up with the third-party API provider	Bob Smith
Update Claire to troubleshoot remaining bugs in the backend	Claire Davis
Update David to finalise the design and share it with the team	David Rodrigues
Update Emily to coordinate with the PR team and finalise the launch plan	Emily Wilson
Update David to prepare alternative design options for the user interface	David Rodrigues
Update Claire to collaborate with Bob on implementing the API workaround	Claire Davis
Update Emily to confirm the venue for the launch event	Emily Wilson

Type user query here. (Shift + Enter for new line)

## Exercise Completion

You've successfully summarized financial statements and meeting minutes. This exercise enhanced your ability to condense complex information and extract key insights efficiently.

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